CIRASYNC

How a Global Investment Firm Unified Contact Sync Across Two Microsoft 365 Tenants

Business Situation:
A $100B+ alternative investment firm needed accurate corporate contacts on more than 2,000 employees' mobile devices across two dozen global offices, plus a way to sync contacts into a mailbox on a separate M365 tenant.

Solution:
While the firm already used us company-wide, we added multi-way sync to extend coverage across its second M365 tenant. This unifies contact distribution on a single platform pairing.

Benefits:
- Fully automated sync eliminates manual directory updates across all staff devices
- New employee information entered in Microsoft 365 propagates automatically on the next scheduled sync, or immediately via manual sync
- Significant time and cost savings as ongoing IT maintenance effort is eliminated

The Challenge

An alternative investment firm managing more than $100 billion in assets came to us needing accurate corporate contact directories to keep its deal teams, operations staff, and support functions connected across two dozen global offices. With 2,000+ employees spread across those offices, the firm needed a dependable way to keep contact information current on every mobile device, without asking its IT team to manage the process by hand.

The firm had already moved off an On-Premises deployment in 2024, migrating to CiraSync, in hopes of reducing the maintenance burden on its infrastructure team. As the firm continued to grow, we expanded their license count by 250 seats mid-term to keep pace with new hires, without disrupting the sync process already in place.

In 2025, a new requirement surfaced. Like many investment firms structured around multiple legal entities, the firm needed corporate contacts to flow into a mailbox that lived in a separate Microsoft 365 tenant. CiraSync handled sync within a single tenant, but this cross-tenant scenario called for a different approach, and the firm wasn't looking to build a custom integration to solve it.

The Solution

Our support team worked with the firm's IT team to demonstrate multi-way sync, which we built specifically for cross-tenant contact synchronization. Rather than treating the new tenant as a separate project, we rolled multi-way sync capabilities into the firm's existing CiraSync deployment, covering both scenarios from one connected setup.

The transition moved quickly. Within weeks of our initial demonstration, we had multi-way sync live and syncing contacts into the second tenant's mailbox, closing the gap. We didn't need any custom engineering on either side.

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Results

We now help the firm run a single, coordinated contact sync strategy across its entire organization. CiraSync keeps corporate contacts current on the mobile devices of all 2,000-plus employees across two dozen offices, while multi-way sync keeps the second tenant's mailbox aligned with the same source of truth.

As the firm's headcount and license needs have grown, we've scaled both platforms without adding complexity for its IT team. What began as a single-tenant deployment now covers a multi-entity structure common across the investment industry, with contact accuracy maintained automatically rather than through manual coordination between tenants.

CiraSync: Built for Complex, Multi-Tenant Organizations

We know investment firms structured around multiple legal entities need contact synchronization that works across tenant boundaries, not just within them. CiraSync with multi-way sync gives firms one coordinated approach to corporate contact sync, whether contacts stay within a single tenant or need to reach a mailbox on another one entirely.

Talk to a Human